

Systems Integration—
European Vendor Challenges

October 5, 1993

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Systems Integration—European Vendor Challenges

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Systems Integration— European Vendor Challenges

IEU/SIP-PL-I- 1

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Notes

The Computer Industry in the 1990s

Technology Revolutions
+
Organisational Evolutions
=
All the rules have changed

IS-86

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Notes

Networking Revolution

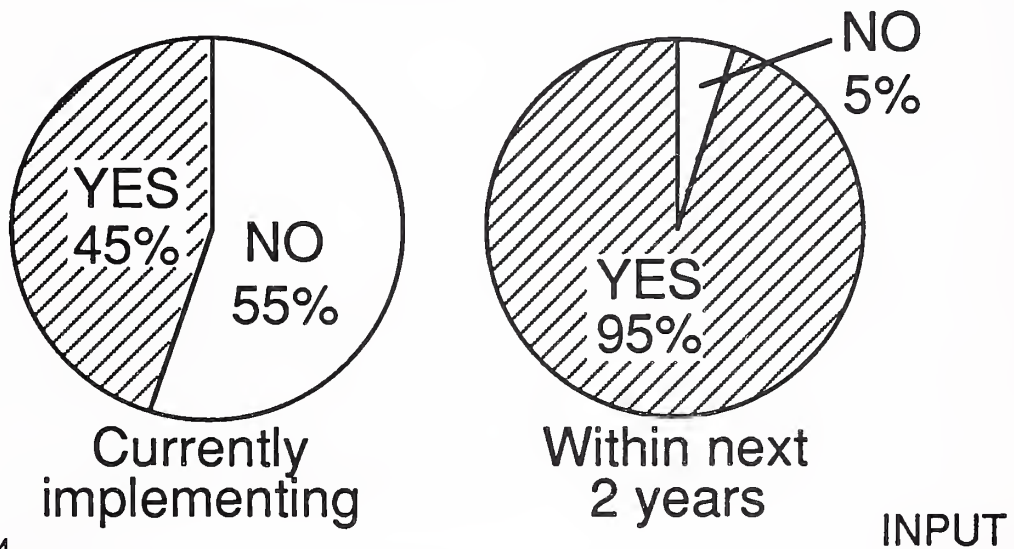
- Technology enabled
 - Bandwidth
 - Coverage
 - Mode (Digital)
- Driven by organisation need
 - Connectivity
 - Electronic commerce

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Notes

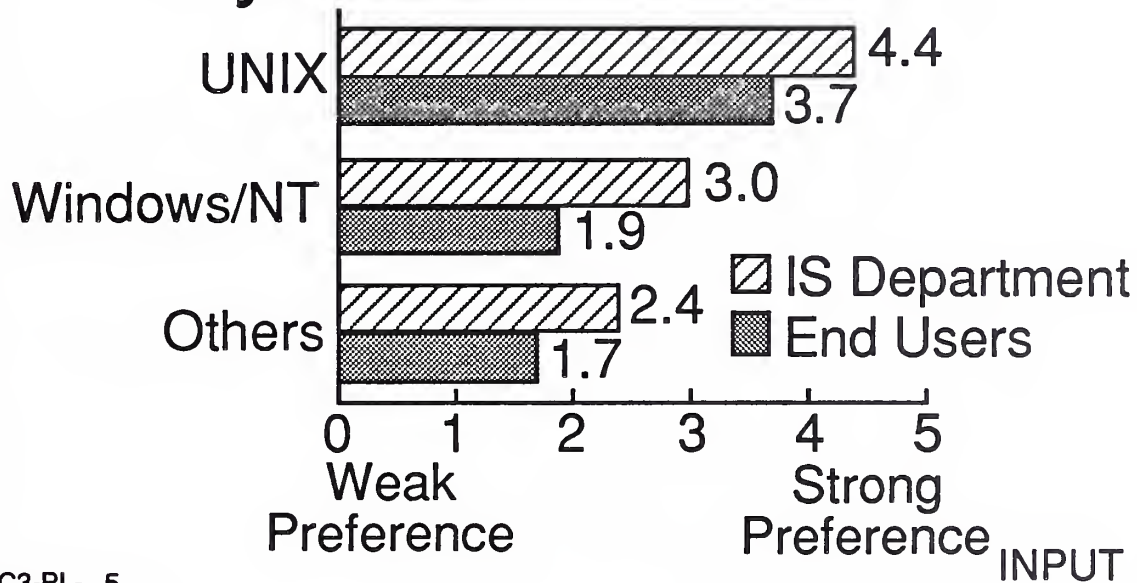
European Client/Server Implementation Plans



MC3-PL- 4

Notes

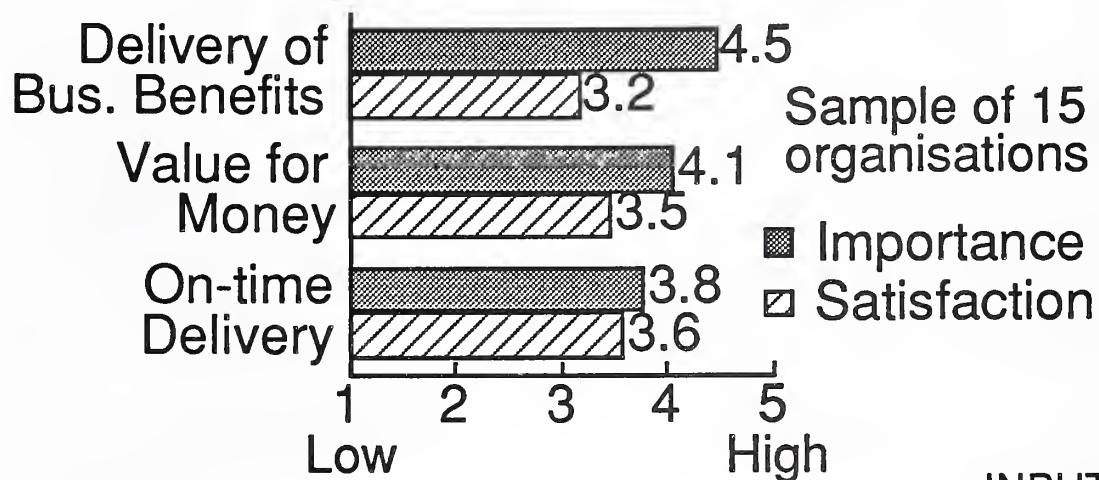
European Operating System Preferences



Notes

Systems Integration

Achievement of Project Objectives

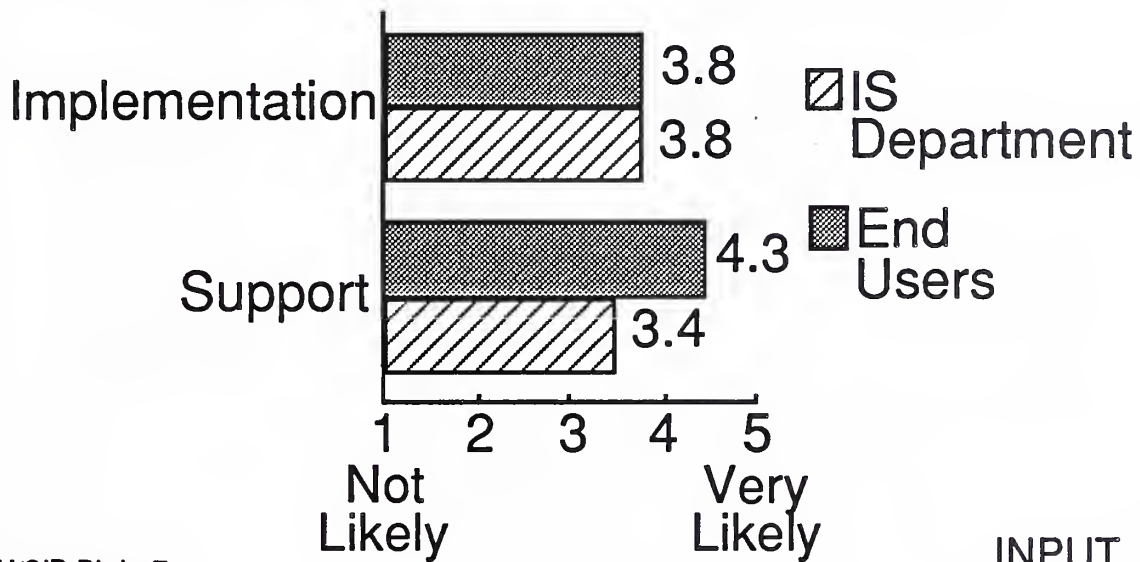


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Notes

European User Need for Client/Server Services

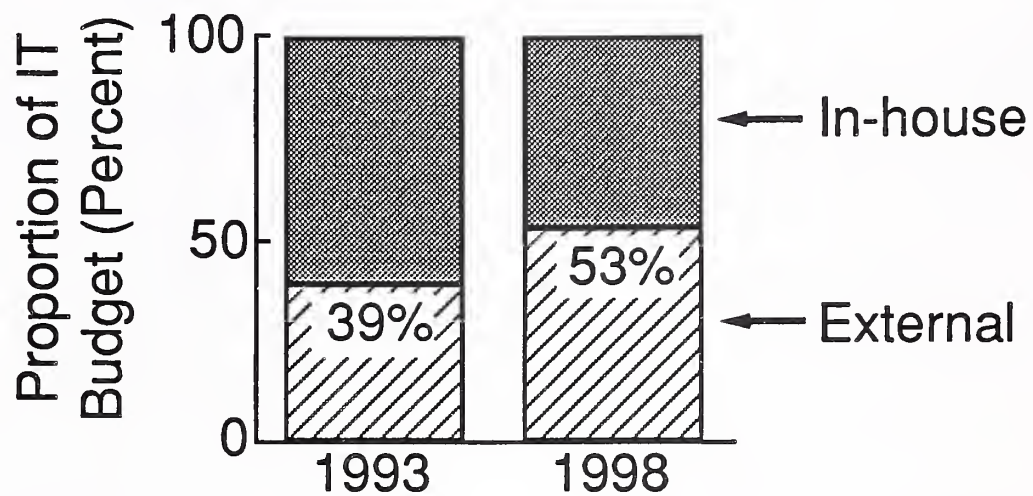


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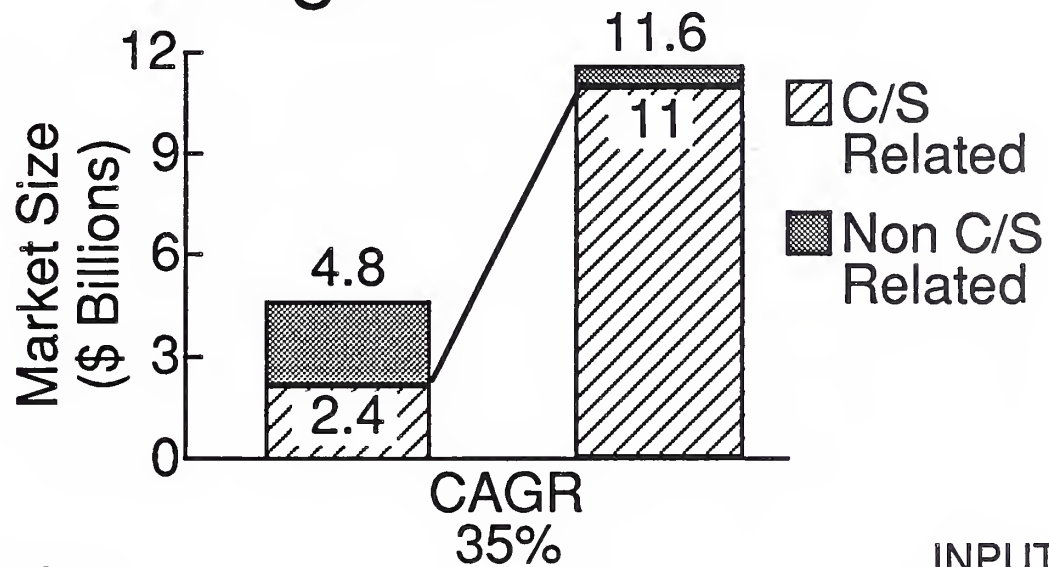
European IT Spending Changes



MC3-PL- 8

Notes

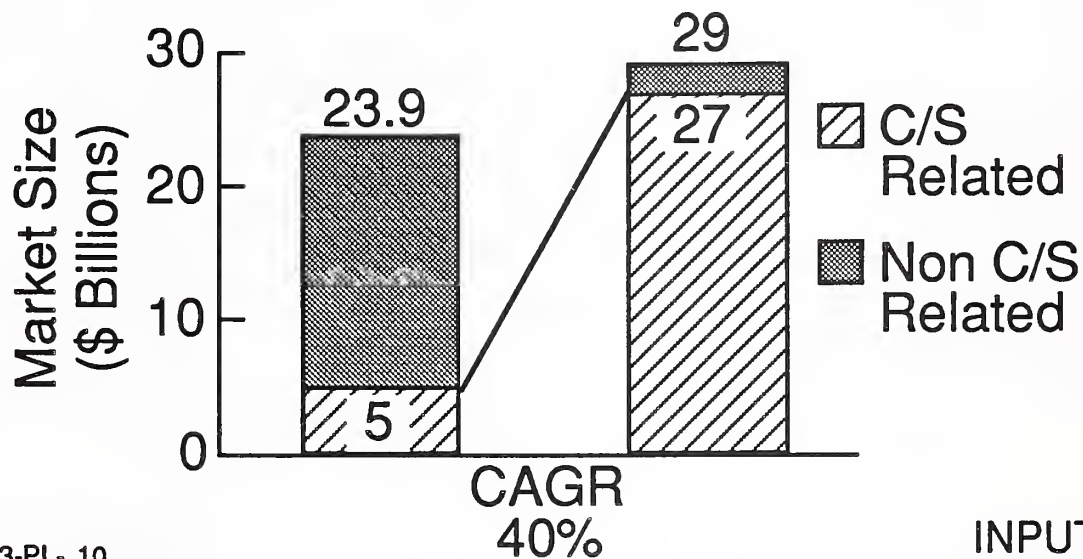
European Systems Integration Market



MC3-PL- 9

Notes

European Professional Services Market



MC3-PL- 10

Notes

Industry Structure and IS Revolution

Operations	
Solutions	
"Old" IS	"New" IS
Packaging	Packaging
Technology	Technology

☐ Successful segments

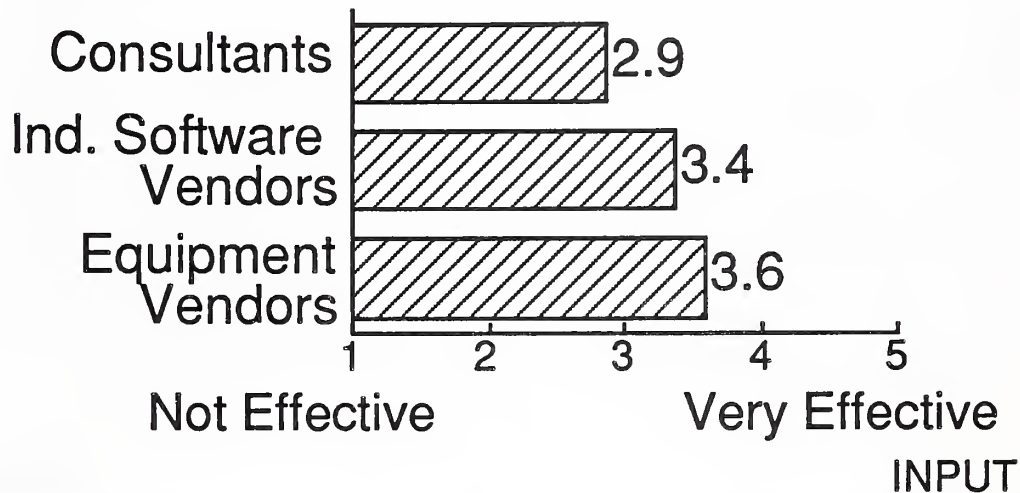
IS-77

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Notes

Systems Integration

Ability to Manage Projects User Perspective, U.K.



E-SI-154

Notes

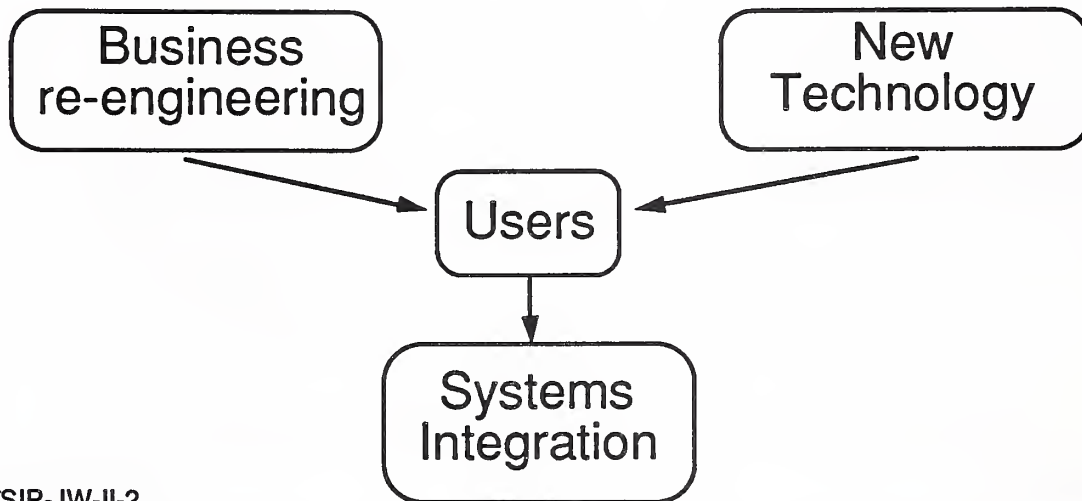
U.K. Systems Integration Market Opportunity

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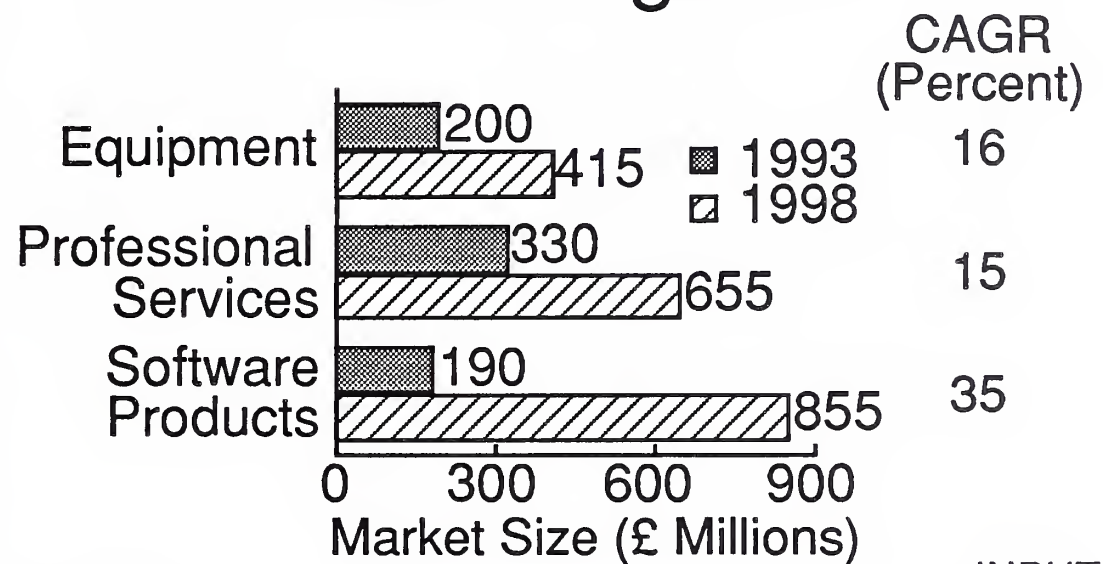
Driving Forces, Systems Integration, United Kingdom



IEU/SIP-JW-II-2

Notes

Systems Integration Market United Kingdom



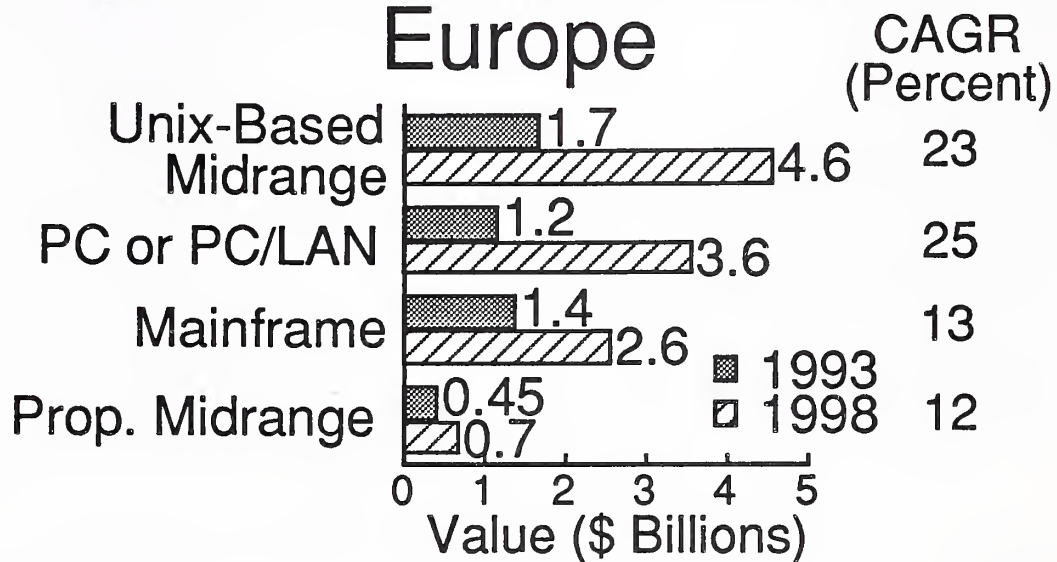
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Notes

Systems Integration

Projects by Equipment Type Europe

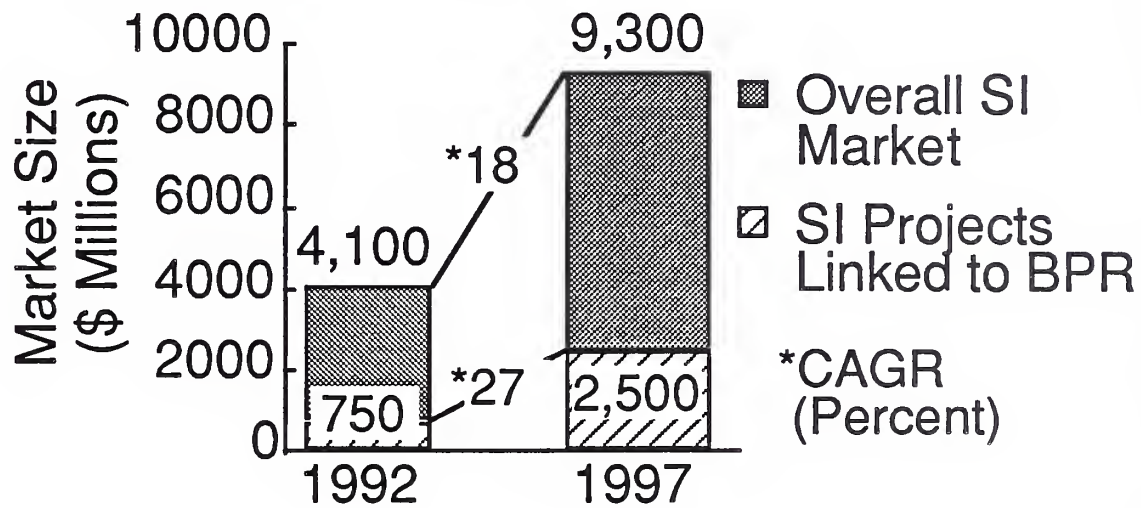


E-SI-161

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Notes

Business Process Re-engineering and the SI Market



SEIC2-II-8

Notes

Industry Growth Systems Integration, United Kingdom

- High Growth
 - Transportation and distribution
 - Telecommunications and utilities
- Low Growth
 - Manufacturing
 - Financial services

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Notes

Vendor Positioning

Business Consultant		
Technologist		
	Mainframe	C/S

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Notes

European Opportunities in Client/Server Project Services

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Notes

Impact of Client/Server Technology

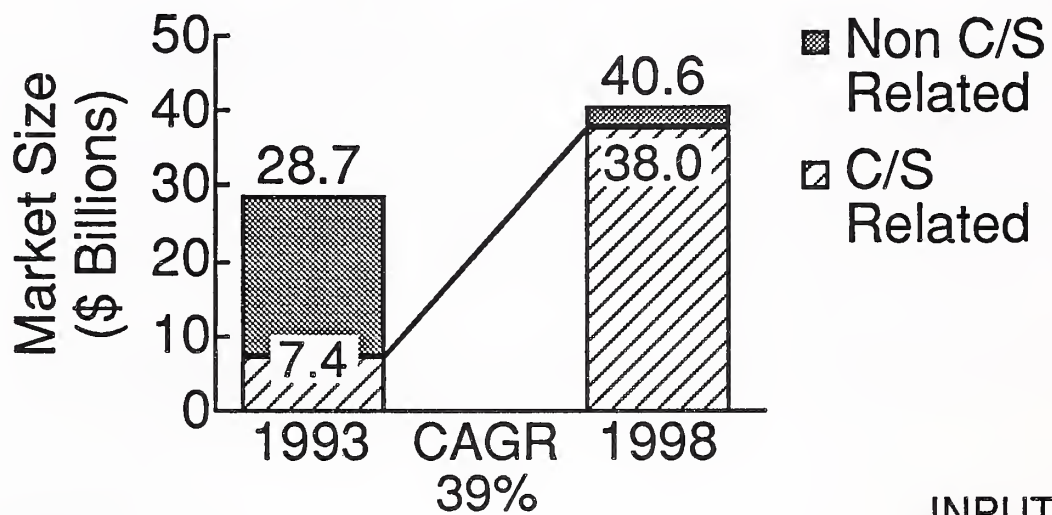
- Client/server technology fuels project services growth
- Integration services are a key requirement
- Level of competition will increase

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Notes

Client/Server Project Services Market Forecast

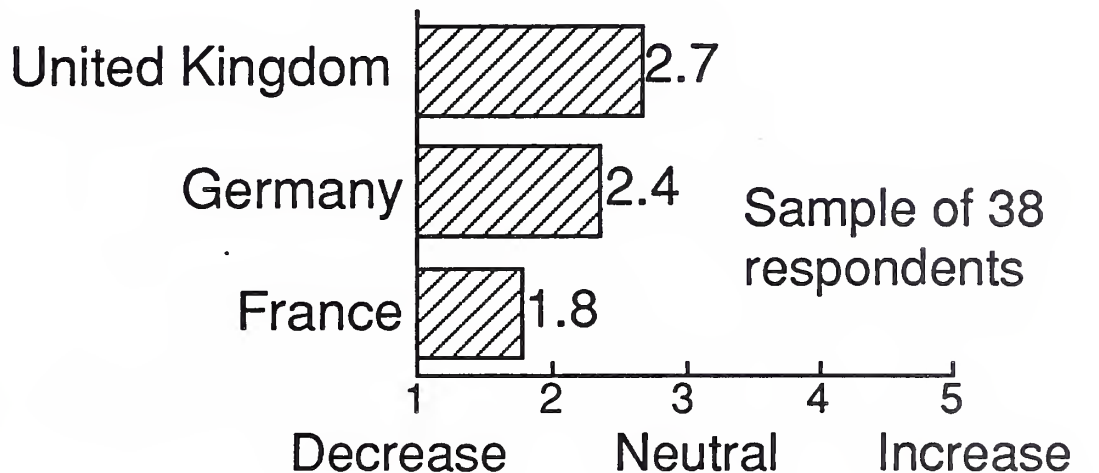


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Impact of C/S Technology on IS Expenditure



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Notes

Impact on Role of IS Department

- Influence on purchasing declines
- Need for retraining/external support
- Greater development productivity

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Notes

Service Requirements: United Kingdom

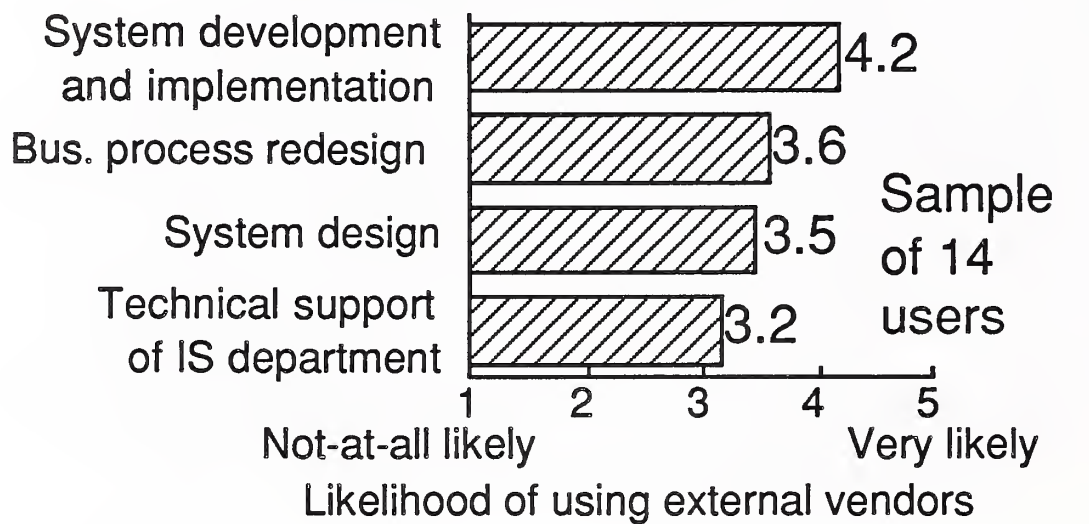
- IS departments require multi-vendor network design and implementation
- End users want application integration services
- Business process redesign is now a key requirement

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Notes

Principal Service Requirements United Kingdom

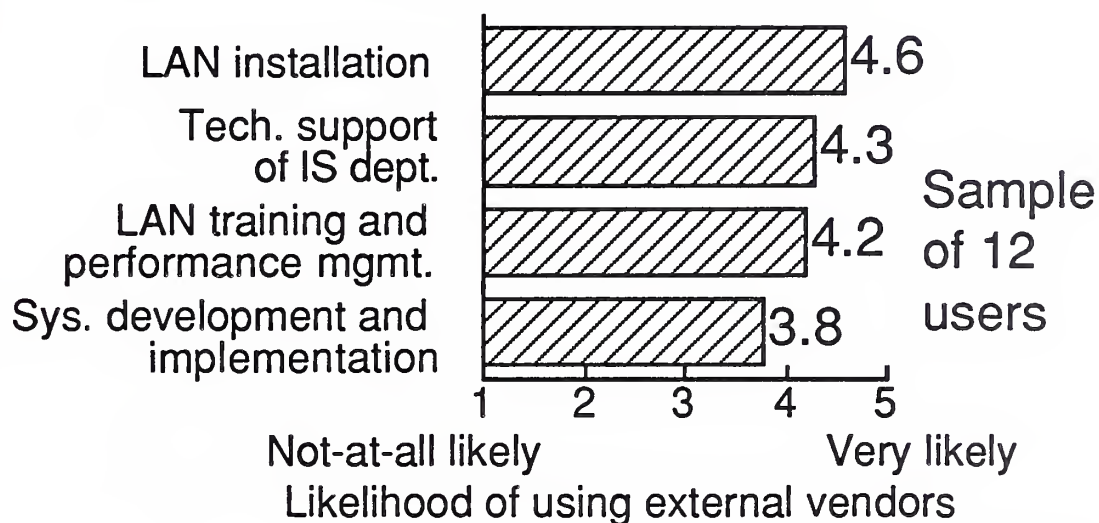


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Principal Service Requirements Germany

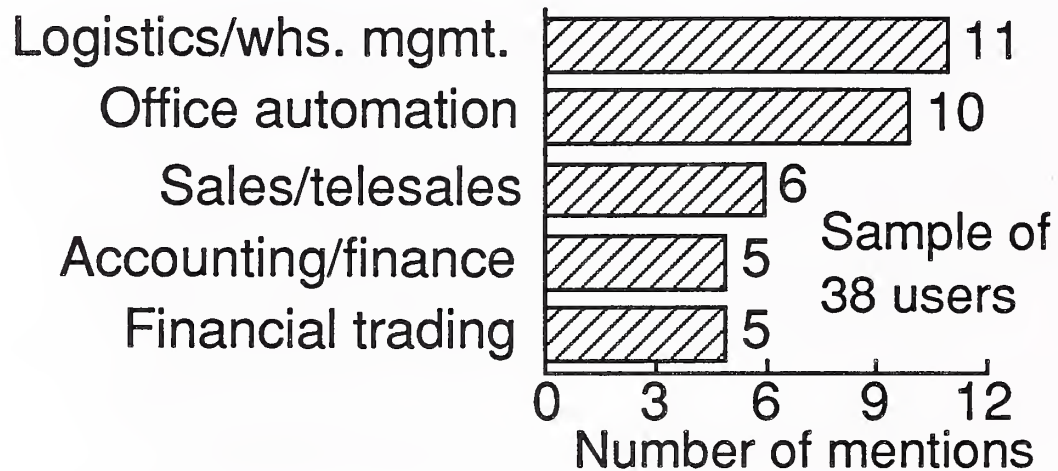


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Notes

Leading Applications in the Client/Server Environment



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Notes

Vendor Selection Criteria End Users

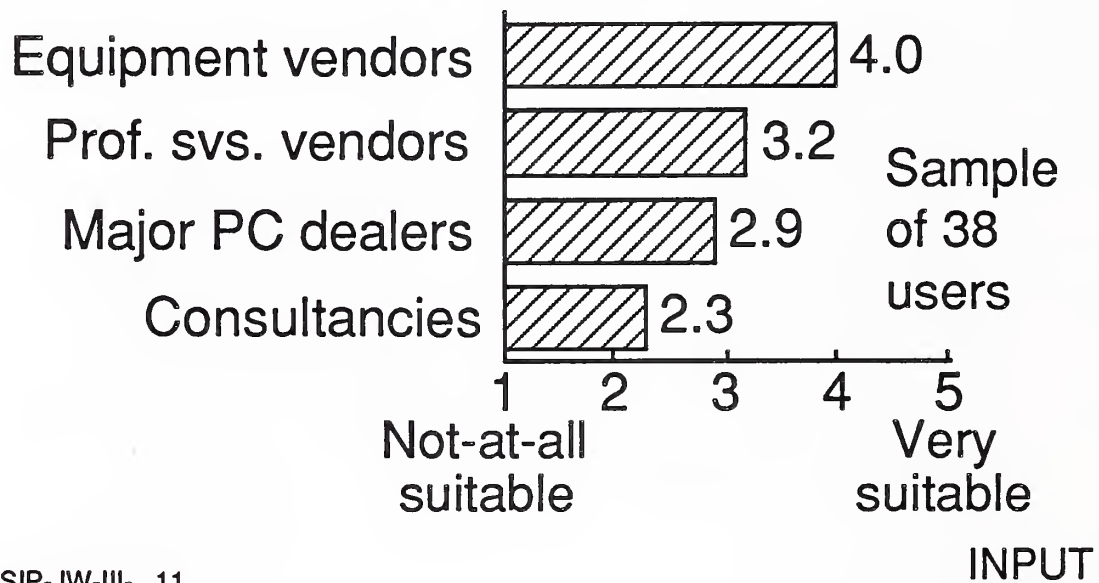
- Proven track record
- Competitively priced industry specific solutions
- Networking capability

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Notes

Perceived Vendor Suitability Europe



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Notes

The Computer Industry in 2001

- IS is a process, not an organisation
- Solutions and services are bought
- Services vendor role greatly enhanced
- Hardware role greatly diminished

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Notes

Successful Vendors

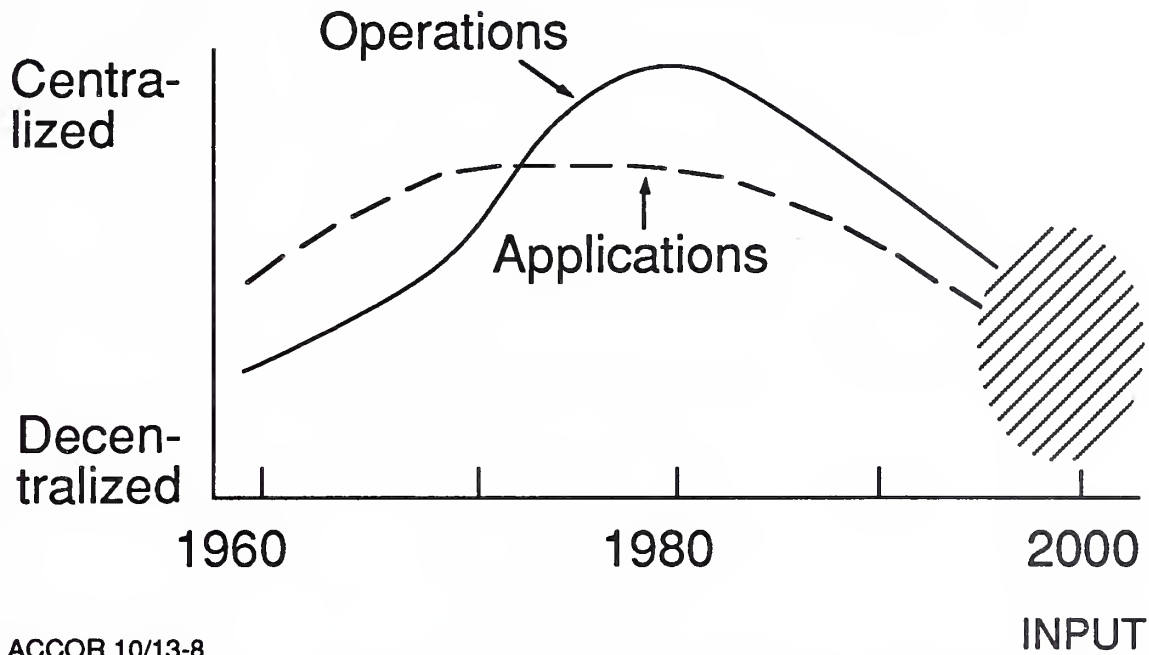
- Knowledge-based
- Network-based
- Low cost—continual improvement
- Low price—continual improvement

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Notes

IT Trends



Notes

Competing in a Revolution

What used to work
doesn't work now!

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Notes

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- **Software and Services Market Forecasts**
- **Software and Services Vendors**
- **U.S. Federal Government**
 - Procurement Plans (PAR)
 - Forecasts
 - Awards (FAIT)
- **Commercial Application LEADS**

CUSTOM PROJECTS

For Vendors—analyse:

- **Market strategies**
- **Product/service opportunities**
- **Customer satisfaction levels**
- **Competitive position**
- **Acquisition targets**

For Buyers—evaluate:

- **Specific vendors**
- **Outsourcing options**
- **Market opportunities**
- **Systems plans**
- **Peer position**

OTHER SERVICES

Presentations to user groups, planning meetings, etc.

Acquisition/partnership searches

Newsletters

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